

RURAL INNOVATORS IN EDUCATION: HOW CAN WE BUILD ON WHAT THEY ARE DOING?

Terry Ryan



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• ACKNOWLEDGEMENTS •

The Rural Opportunities Consortium of Idaho (ROCI) was launched by the J.A. and Kathryn Albertson Foundation of Boise, Idaho during the summer of 2013. Since then, Bellwether Education Partners and a task force of experts led by Dr. Paul T. Hill have been working to foster a better understanding of the issues that affect rural education, inform policy discussions, and bring attention to the unique needs and circumstances of rural school children. The task force has published a series of papers on issues such as migration, technology, human capital, and economic development. A second series of papers, published in summer 2015, will focus on post-secondary transitions and challenges. Papers are posted online at www.rociidaho.com/research-publications.

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ABOUT ROCI • RURAL OPPORTUNITIES CONSORTIUM OF IDAHO



ROCI brings together some of the nation's best thinkers to conduct research on the challenges of rural education and identify innovations, programs, and models to address them. This effort informs a national body of work on rural education and explores implications for increasing the educational attainment and economic competitiveness of Idahoans and Americans.

ABOUT JKAF • J.A. AND KATHRYN ALBERTSON FOUNDATION



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Bellwether Education Partners is a nonprofit dedicated to helping education organizations—in the public, private, and nonprofit sectors—become more effective in their work and achieve dramatic results, especially for high-need students. To do this, Bellwether provides a unique combination of exceptional thinking, talent, and hands-on strategic support.

• INTRODUCTION •

The future opportunities of the children who grow up in rural communities, and the economic resiliency of the communities themselves, depend significantly on the schools available. In states like Idaho, where rural students make up a significant share of the future talent pool, the performance of rural schools affects the whole state's prospects.

Rural America is undergoing profound demographic changes. Large chunks of the country's interior are aging and seeing their younger residents migrate to population centers for employment. Consider Idaho, where I live and work and the Rural Opportunities Consortium of Idaho (ROCI) is based. Census data for household projections for the period 2014–19 show the state's student population undergoing significant changes. In short, Idaho (long considered a bastion of rural America) is expected to become more urban/suburban, more culturally diverse, and less wealthy as

the economy further transitions away from farming, manufacturing, and mining, and as young people from across the state, the country, and the world migrate to Idaho's handful of population centers for education and work.¹

Idaho is a microcosm of trends playing out across large swaths of the American heartland. According to 2014 census data, "nearly 60 percent of rural counties shrank in population [in 2013] up from 50 percent in 2009 and around 40 percent in the late 1990s."² William Frey, a demographer at the Brookings Institution, reports "almost eight

in 10 of the counties that lost population over the past three years were outside of metropolitan areas...Over half of those counties were heavily dependent on farming, manufacturing, or mining.”³ Further, “of the 703 high-poverty counties in the United States in 2007–11, 571 were non-metro.”⁴

The economic health and vitality of all communities is connected to jobs and employment opportunities. Yet increasingly it’s the cosmopolitan centers that offer high-skilled and high-paying occupations that serve as magnets for young people. We’ve seen this movie before in rural America, and in industrial cities like Buffalo; Detroit; Dayton, Ohio; and Gary, Indiana. Economic and demographic changes have zapped the vitality of these cities. Similar shifts are playing out in small towns and rural hamlets across the country.

Rural communities are struggling, but they still play important roles in the culture and economies of most states. Despite dwindling in numbers and enrollment, rural schools still educate large numbers of children (10 percent nationwide, 27 percent in Idaho). Some are even growing, as advantaged localities stabilize their economies and attract new residents (Teton County in Idaho, for example), including large numbers of former migrant workers who have settled in many communities. The future opportunities of the children who grow up in rural communities, and the economic resiliency of the communities themselves, depend significantly on the schools available. In states like Idaho, where rural students make up a significant share of the future talent pool, the performance of rural schools affects the whole state’s prospects. How can rural schools improve in turbulent times?

As the American economy accelerates away from farming and manufacturing toward a greater reliance on high-level services, there is nothing more crucial to the revitalization of communities than education. This is as true for small towns in rural America as it is for cities in the Rust Belt. Just like big-city education, rural education needs to reinvent itself to sustain not only itself but also the local community, and to make learning relevant to students.

Big-city leaders have embraced school innovation and improvement efforts as the key to their communities’ turnarounds. Back in 2007, for example, Mayor Frank Jackson of Cleveland told the *Columbus Dispatch*, “Our problem is families with children. People are making their choices based on education and if I am able to make our school district a district of choice where people want to put their children because of excellence, then I can guarantee you that our population reduction will come to a halt.”⁵ Like their big-city

In response to shifting economic and demographic trends, there is an expanding number of innovators across the country taking ideas like charter schooling and innovative uses of technology and applying them to the rural space.

brethren, rural leaders need to innovate in education to survive. Charter schooling is one of the innovations being embraced in cities, and increasingly in rural communities, to help move education forward.

Charter schools share many commonalities with rural district schools. Both are small in scale compared to their public school counterparts in cities and suburbs. Both

are highly dependent on building-level leadership for their success. Both operate under tight fiscal constraints and are susceptible to sudden changes in enrollment that can be catastrophic to budgets and programs. Both grapple to recruit and retain top teaching and leadership talent. Both struggle to provide curriculum and course diversity. Because of their small scale, both spend more per pupil on things like testing and accountability. Both are trying to find ways to use technology to make their schools more efficient, while improving the quality and scope of course content available to students.

In response to shifting economic and demographic trends, there is an expanding number of innovators across the country taking ideas like charter schooling and innovative uses of technology and applying them to the rural space. This paper shares lessons from three leading education improvement efforts that are taking very different approaches to school and schooling for rural students. It first profiles the work being done in Dublin, Georgia, to convert that community's school district into a high performing "charter system." In response to significant economic and social change, the rural Dublin City School District in southeast Georgia has embraced a portfolio approach to school governance that builds on 25 years of the charter school experience in this country. The Dublin effort is showing its worth academically and offers important insights for those communities wanting to improve their schools by embracing the charter bargain: greater freedom and flexibility in return for results.

The second profile is of Beyond Textbooks (BT) in Vail, Arizona. BT was a district innovation that emerged from the economic crisis of 2008. It is now an online curriculum, accessible through a wiki, that facilitates the ability of more than 10,000 teachers to share their best lesson plans, ideas, and resources through an online commons. It is also a state-of-the-art instructional framework that school districts and charter schools

across three large Western states can adapt and plug in for their teachers and students. BT brings scale through technology to those schools—small rural districts and one-off charter schools—that often need it most.

The third profile is of a partnership between a charter school in rural Idaho that is working with two area school districts to improve the educational opportunities made available to some of that state’s most isolated schools and students. In a collection of working partnerships led by a remarkable wife-and-husband education team, the Upper Carmen Charter School, the Salmon School District, and the South Lemhi School District are collaborating to launch a blended-learning high school program and to expand a high-performing early literacy curriculum.

These profiles provide important insights into how to help education work better for the more than 11 million students who attend schools in rural America. The concluding portion of the report offers up five policy lessons for Idaho and other rural states that emerge from the efforts highlighted here. These innovators and their work supply proof points for how education can be restructured across rural America to help all of its children maximize their human potential.

• INNOVATION I: EMBRACING CHARTER FREEDOMS TO IMPROVE RURAL DISTRICT SCHOOLS •

One of the most significant developments in American education during the last decade has been the reconceptualization of school districts and how they should be organized and managed. Neerav Kingsland, former CEO of New Schools for New Orleans, described this as a movement of “relinquishers.”⁶ Relinquishers, according to Kingsland, are superintendents who use their authority to transfer power away from the central office to individual schools—and, most important, to their principals and teachers.

One of the most significant developments in American education during the last decade has been the reconceptualization of school districts and how they should be organized and managed.

For more than a decade, education researchers like Paul Hill, Christine Campbell, and Bethany Gross at the University of Washington’s Center on Reinventing Public Education have written about “portfolio school districts.”⁷ Like Kingsland’s relinquishers, portfolio school district leaders see their role not as running the schools, but rather as creating the conditions for a

“tight-loose” system of school management—“tight” as to results, but “loose” with regard to operations. Superintendents are no longer owner-operators of schools, but rather “quality control agents” for portfolios of different types of schools in their districts.

Big-city school districts have led the way in the movement toward “portfolio management.” Some of the best-known examples are Cleveland; New Orleans; Washington, D.C.; Indianapolis; and Denver. According to Hill, Campbell, and Gross, there are now more than 30 school districts across the country that they have identified as pursuing the portfolio strategy to varying degrees.

None of the districts identified by Hill and his colleagues are rural, but rural districts are starting to enter this innovative space as well.

DUBLIN, GEORGIA’S CHARTER SCHOOL DISTRICT

The Dublin City School District in southeast Georgia has been a leader in adopting charter-like freedoms and flexibilities for its schools, families, and children. This rural school district embraces competition and school choice. It is open-enrollment and attracts students from surrounding counties as far as 40 miles away. Superintendent Chuck Ledbetter, a former college football player and high school football coach from Alabama, believes “people make choices for different reasons, and it is important to let people make choices.”

For most of the 20th century the economy around Dublin was based largely on the textile industry. All that changed in the 1990s, according to Brad Lofton at the Dublin-Laurens County Development Authority. “The textile industry here was a casualty of NAFTA and we are still digging out of that collapse,” shared Lofton in a phone call with me in late 2014.

Unemployment in Laurens County is almost 10.5 percent, nearly double the national average of about five percent.

In Georgia, business and football are king. In 2014, the Peach State was rated the top state in the country—and Dublin-Laurens County has a reputation as one of the best best regions in Georgia—for doing business. In recent years, “Dublin and Laurens County

• Sidebar •

IN RECRUITING INTERNATIONAL COMPANIES TO A COMMUNITY, EDUCATION MATTERS IN TWO IMPORTANT WAYS:

- 1 Top executives and their spouses want to know there are quality school options for their children before moving to a place.
- 2 Businesses want to know that they can find the employees they need to get the work done in their factories and facilities.

have landed a slew of manufacturers, including a Latvian-based [sic] company that last week announced plans to invest \$20 million in a fiberglass plant that's expected to create 150 jobs."⁸

Education is a critical piece of Dublin's economic development strategy. This connection is evidenced by the fact that the Dublin district's Associate Superintendent Fred Williams is the Chairman of the Board of Directors for the Dublin-Laurens County Development Authority.

In recruiting international companies to a community, education matters in two important ways. First, top executives and their spouses want to know there are quality school options for their children before moving to a place. Second, businesses want to know that they can find the employees they need to get the work done in their factories and facilities. In fact, "existing workforce skills" is the number one factor in top business climate rankings.⁹ Superintendent Ledbetter stated bluntly, "We collaborate closely with the economic development authority...We are all in this together." Brad Lofton from the development authority agreed: "Education is connected to economic development, which is connected to quality of life."

GEORGIA STATE LAW ENCOURAGES NEW WAYS TO STRUCTURE DISTRICT SCHOOLS

Georgia's state leaders understand the nexus between education, jobs, economic development, and ultimately the sustainability of communities. Giving communities and school districts space to innovate, state law was changed in 2008 to encourage school districts to become charter systems (charter districts). The idea of a charter system builds on nearly 25 years of charter school experience from across the country. As Kingsland, Hill, and others have observed, it offers the possibility of bringing the charter bargain—greater freedom and flexibility in return for results—to more schools and more students.

According to the Georgia Department of Education, "A charter system is a local school district that operates under the terms of a charter between the State Board of Education and the local district. The system receives flexibility from certain state rules and regulations in exchange for greater accountability. There is an emphasis on school-based leadership and decision-making."¹⁰ Lou Erste, Associate Superintendent for Policy and Charter Schools with the department, told a gathering of district and charter leaders in August 2014, "If you are not committed to turning your district upside down and having legitimate local school governance you shouldn't apply, you shouldn't sign a letter of intent for that. A charter system is a commitment kind of like marriage."¹¹



The charter system has given us flexibility from rules that allow us to do more for kids.”

CHUCK LEDBETTER
Superintendent, Dublin, Georgia

The Dublin City School District in southeast Georgia has been a leader in embracing the charter district option. Dublin City Schools, established in 1897, initiated a five-year charter with the State Board of Education on July 1, 2011. The city of Dublin has a population of about 18,000 and its school district serves about 2,800 students (82 percent of whom are eligible for free and reduced-price lunch). About 80 percent of the district’s students are African American. The district portfolio consists of three theme-based elementary schools, a middle school, an academic high school, and a Title I nontraditional school that serves 450 students in grades 6–12. High school students also have access to the recently launched career tech regional charter high school.

Important to Superintendent Ledbetter is the fact that “the charter system has given us flexibility from rules that allow us to do more for kids.” Specifically, he said it “allows us to pilot new ideas.” These new approaches include:

- Creating three K–5 schools that are defined by their own unique academic themes and are open-enrollment (families from anywhere in the district and beyond can apply);
- Using flexible scheduling to offer students the opportunity to take courses from local colleges or, if needed, credit-recovery programs;
- Moving toward mastery-based learning over seat time requirements;
- Launching the Heart of Georgia College and Career Academy in partnership with four public school systems, three area chambers of commerce, the Dublin-Laurens County Development Authority, Oconee Fall Line Technical College, and Middle Georgia State College; and
- Bringing to Dublin High School the academically rigorous International Baccalaureate program.

Emory Bostic, principal of the alternative Moore Street School, believes that being a charter district means “we aren’t afraid to do things.” Ledbetter goes further and says he encourages his building leaders to “break rules with integrity in order to deliver for kids.” Saxon Heights Elementary principal John Strickland believes the district’s charter status allows a “culture shift.” “It triggered a change in mindset. We don’t have to do things here because of the system. We do things because we think it works for kids,” observed Strickland. He added that his school has seen a dramatic decline in referrals for discipline issues since the change to district charter status.

FLEXIBILITY AND ACCOUNTABILITY GO TOGETHER

The Georgia district chartering process is also about accountability. It requires the district and its schools to work out their goals, how they define success, and how people will be held accountable for delivering results. It provides transparency, as the goals and targets for the district and the schools are shared with the state. According to Bostic, “There is a legitimacy through the certification process and of being recertified (five years later) through the renewal process.” The process of defining targets and measures of success is, Bostic said, “especially important for an alternative school like the Moore Street School.”

The Georgia district chartering process is also about accountability. It requires the district and its schools to work out their goals, how they define success, and how people will be held accountable for delivering results. It provides transparency, as the goals and targets for the district and the schools are shared with the state.

For Moore Street students, credit recovery is an important component of the school’s offerings. Bostic said, “Young people have to understand you get out of it what you put into it.” Credit recovery is a tangible thing that students understand. They know it is a real step toward a high school diploma.

Students and their parents are engaged in what’s happening in the Dublin schools. Parents make a proactive decision as to which school within the district portfolio their children will attend. When open enrollment for seats in Dublin’s three elementary schools

took place in 2011, parents stood in line overnight to ensure that their children got into the elementary school they thought worked best for them. Critics argued at the time, Ledbetter remembers, that no parents would show up for the open-enrollment process because they were apathetic, or that having open enrollment into the schools would lead to the resegregation of the public schools.¹² Neither criticism played out.

Because of charter district status, there is actually more engagement in the schools—not only by the parents and students, but also by teachers. Under the charter contract between the state and Dublin City Schools, each building is required to “utilize a governing council as its governing body, which shall operate with the intent and purpose of maximizing school-level decision making.”¹³ Both teachers and parents have a role on these governing councils, and the councils (with significant input from building principals) have “decision-making authority in personnel decisions, financial decisions, curriculum and instruction, resource allocation, establishing and monitoring the achievement of school goals, and school operations.”¹⁴

In practice, this means building-level leaders like Bostic and Strickland have a real say in what happens in their buildings. This starts with the fact that they draft their own budgets. Of course, Ledbetter observed, “in recent years that has meant they have a say in where to make cuts.” When it comes to the hiring and firing of teachers and other building-level staff, school leaders—again with input from their governing councils—have authority to hire the staff they think works best for their schools. However, the district board, according to Ledbetter, has “the right of refusal.” In short, a district board can’t tell the schools whom to hire, but it can veto particular hires.

All school employees are considered district employees; if a principal decides a teacher has to go, the formal decision is announced and owned by the superintendent. About this, Ledbetter said, “This is a pretty small town and people are apt to run into each other at the store or in church.” It is important to point out that Georgia is a right to work state and the teacher’s unions are relatively weak. There is no collective bargaining agreement for teachers in Dublin, but there is teacher tenure. According to Ledbetter, “You have to follow a formal process to dismiss staff, but we don’t have to keep staff that don’t work well for the kids and schools.” But, he added, “none of us are into firing people.” He shared that because of the economic crisis of recent years good people had to be let go, and “this hurt families, students, and the larger community.”

In Dublin, like rural communities across the country, the economy, the community, and the local schools are intimately intertwined. The fiscal cliff that hit state and local budgets in 2008–09 was a turning point for the Dublin schools. According to Ledbetter and his team, the economic pain encouraged them to do things differently, and changes to state policy offered additional incentives for the district to embrace the charter district concept. Not only did it offer the district and its schools more flexibility, it also came with new dollars: \$85 per student.

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Being a charter school district has made it easier for Dublin City Schools to react to opportunities. For example, Dublin High School decided to pursue “International Baccalaureate (IB) World School” status, and in the autumn of 2014 the school joined the ranks of more than 3,750 IB World Schools in 147 countries.

According to the district, “The two-year curriculum is internationally recognized, which will in turn facilitate global mobility to all participating Dublin High School students.”¹⁵ It is also a program readily recognizable to citizens from other countries who move to help lead and build companies in Laurens County.

To provide career opportunities for Dublin’s students aligned to the area’s growing economic opportunities, Dublin City Schools helped spearhead the launch of the Heart of Georgia College and Career Academy. The Academy is Georgia’s second regional “college and career academy,” and it builds on the work and materials generated by the Southern Regional Education Board’s Commission on Career and Technical Education.¹⁶ The Academy, according to Ledbetter, was the result of “pleas from both employers and students for industry-specific skills.” In 2014–15 it launched as a pilot with 40 area 9th graders. Ultimately the Academy expects to enroll 800 students—400 in the morning and 400 in the afternoon—with students taking half of their courses in their home districts. Its partner school districts have also agreed to provide various in-kind supports to the Academy that include teachers and building and maintenance support.

Ledbetter shared that “industry is helping pay for the cost of teachers and equipment,” and added that adults are also going to be able to take courses and earn industry credits from the Academy. Tiffany Lofton, the Academy’s CEO, believes that industry certification shows employers that “our students can do anything,” while partnering with the county in this effort makes good sense “because both of us are looking where our students are coming from and where the opportunities are.” According to Ledbetter and Lofton, industry certification is key in proving to employers that graduates are actually ready for the modern workplace.

GETTING EVEN BETTER

In an interview for “American Graduate: Let’s Make It Happen,” a public media initiative supported by the Corporation for Public Broadcasting, Ledbetter remarked, “Since moving to a charter system, the district’s high school graduation rate has improved, it’s led to greater community involvement, and a number of large companies have moved into the Dublin area.”¹⁷ But not everything is perfect.

Ledbetter and his team shared that both the IB Program and the Heart of Georgia College and Career Academy efforts “have collided with some existing state rules and regulations.” For example, raw test scores from the state’s assessment system don’t capture many of the advanced skills required of IB or the skills and knowledge related to professional credentials. Further, seat time requirements are largely irrelevant to students spending half of their time in an industrial fellowship or internship.

Ledbetter believes that “funding Carnegie Units doesn’t work for students participating in the Middle Georgia State Aviation Program.” Because of these disconnects, Ledbetter and his team are pushing for changes to the state funding formula so that it is no longer defined around six or seven school-based units. “Seat time should be waived and there should be a focus on mastery of content, while funds should follow students to the programs they actually participate in,” argues Ledbetter.

Dublin is going to seek more flexibility in its 2016 charter renewal with the state, but Ledbetter worries that some of the state’s lawyers may want to “overregulate” the effort at the expense of “space to innovate.” He wants to rework the goals and the achievement targets to reflect what they’ve learned over the last five years. He said his ultimate goal is to “do what’s necessary for the community and to generate productive students.”

• INNOVATION II: BREAKING DOWN BARRIERS THROUGH TECHNOLOGY TO SERVE ALL STUDENTS BETTER •

The Vail School District in Arizona (located about 20 miles south of Tucson) is one of the country's fastest-growing school districts, and until recently was a rural district. In the 1980s it served fewer than 500 students, but over three decades it has expanded to serve more than 12,000 students in 18 buildings. The district was an early adopter of open enrollment and charter schools, and it is perennially a top performer in the Grand Canyon State.

Vail School District, like high-performing charter school networks (e.g., KIPP, Aspire Schools, Uncommon Schools, Rocketship, etc.), sees itself as a change agent and innovator. It serves not only as a stellar educational choice for its families and children, but also as a "skunkworks" project for education innovation in Arizona and beyond.

The district is led by veteran educator Calvin Baker, a Midwest farm boy from Minnesota who cut his teeth as a school administrator in rural Alaska. The straight-talking Baker admits he "loves to get stuff done." To that end, when the district's finances were cut significantly in the financial meltdown of 2008, Baker and his team looked for ways to find "revenue sources for working through our financial crisis." In that year's leadership retreat, "Vail's director of technology suggested creating an online system that included lesson plans and calendars for when certain concepts should be taught...It also included a means for teachers to share materials online, breaking down barriers of time and distance."¹⁸

Vail was spending upwards of \$55 per student on textbooks 10 years ago. It's down to three dollars per student with Beyond Textbooks."

JUSTIN CHESEBROUGH
Director, Beyond Textbooks

From this conversation emerged Beyond Textbooks (BT). BT offers partner school districts and charter schools digital access to Vail's curriculum through a wiki, while facilitating the ability of teachers to share their best lesson plans, ideas, and resources through an online commons. The effort is fully aligned to state academic standards in English language arts, mathematics, science, and social studies.

Vail teachers and administrators define what students should do to demonstrate understanding of each standard. From this the team crafts curriculum calendars for when and how long the specific standards will be taught, and determines which materials and resources are needed.

Through BT, Vail has moved almost completely away from textbooks and has seen significant cost savings as a result. According to Justin Chesebrough, BT Director, "Vail was spending upwards of \$55 per student on textbooks 10 years ago. It's down to three dollars per student with Beyond Textbooks." Moving beyond textbooks was just the start of innovations launched by Vail to get through tough economic times while steadily improving student achievement.

KEY STATISTICS FOR BEYOND TEXTBOOKS

• Figure 1 •

82	Arizona District Partners
17	Arizona Charter Partners
10,000	Teachers Involved
100,000+	Students Involved
3	States Involved—Arizona, Wyoming, Idaho
\$1.5 million	Annual Budget
5	Full- and part-time staff as needed

Superintendent Baker maintains an appreciation and respect for the challenges facing both rural districts and charter schools. “There is no way they can do it all. There is too much politics and too much to do—finance issues, operational issues, personnel issues. It is just physically impossible to do it all,” he argues. BT is especially powerful for small rural districts. According to Baker, “It is an instructional framework that rural districts can adapt and plug in. The same for charters that lack scale.”

As Arizona has worked in recent years to implement the Common Core Academic Standards in English language arts and mathematics, the work of BT has become even more important to its 101 partner districts and schools. BT has provided districts and charters a way to address the opportunities and challenges of implementing the Common Core. It is this systemic framework for implementation that has drawn rural school districts in Idaho and Wyoming into BT. According to longtime Arizona education leader Lisa Graham Keegan, “Cal Baker and his team in the Vail School District are quintessential educators. I think they are the best example we have of what can give Arizona a new generation of excellence in learning.”

Vail’s early ally in the development, refinement, and implementation of BT was the rural Benson Unified School District. Benson serves about 1,300 students and is made up of a traditional primary, middle, and high school, as well as a charter high school and a virtual academy. It is an open-enrollment district and competes with other districts and charters for students, drawing them from as far as 50 miles away. Benson is about 27 miles east of Vail, just off of Interstate 10; because of its academic prowess and reputation, the district added 150 students (a 10 percent jump in enrollment) from 2013 to 2014. The Vail/Benson partnership around BT emerged from the close friendship between Baker and Benson Unified’s then-superintendent, David Woodall. According to Baker’s staff, the collaboration emerged “from a run the two of them had in the desert.”

Benson Primary School was the top-ranked elementary school in Arizona in 2014, and was also a US Department of Education National Blue Ribbon School. According to new Superintendent Micah Mortensen, Benson’s recent success and academic gains directly correlate to the district’s adoption and fidelity to BT. Mortensen said, “Staff bought into Beyond Textbooks and have incorporated common planning times throughout the week for the program...This has led to better collaboration and trust among teachers.” He continued, “There is no doubt in my mind that Beyond Textbooks helps kids get to a higher level, and it helps close achievement gaps because it helps teachers work smarter.” Special education students are seeing some of the most significant gains.

BRINGING SCALE THROUGH TECHNOLOGY TO RURAL DISTRICTS AND CHARTER SCHOOLS

“Because it works” was motivation enough for Superintendent/Principal Shad Housley to buy into BT. Housley runs the rural Pomerene School District, which is located about five miles north of Benson. Pomerene serves 87 students in a K–8 building. Its peak enrollment in recent years was 125 students, but the numbers are down because the community is getting older and jobs in the area are tougher to find. According to Housley, “There used to be five dairies in the area and that number is now down to just one.” Upon graduation, Pomerene’s 8th graders go to high school in Benson or to nearby St. David. Despite its size, Housley believes, “the community would go crazy if the school were ever forced to close.”

Housley taught in Benson, and brought BT with him when he returned home to lead Pomerene in 2013. At first, he acknowledged, there was resistance to BT among some of his nine teachers, who saw it “as a Vail thing.” But it works—and that fact quickly trumped the negatives about it being an outside imposition. Housley shared that BT is powerful because it “gives my teachers resources and access to other teachers across the state.” It also provides valuable support for new teachers, and for a small rural district like Pomerene that is a big deal. According to Housley, his district had two teacher openings in 2014 and only three applicants. Recruiting and developing new teachers is a serious challenge for rural districts, but Housley notes that BT “offers a powerful tool for their induction into the school system.” New teachers aren’t just thrown into a classroom; they are given a resource that helps them deliver quality instruction from their first day.

BT Assistant Director Megan Folkers believes BT has become “the premier professional development provider in the state.” There was a void to be filled and “we stepped into it,” said Folkers. Partner school districts and charter schools pay a flat fee of \$3,000 a year. Districts and schools also pay an ongoing fee of \$10 per student. According to Pomerene’s Housley, “Beyond Textbooks allows me to save money...We are tapping into scale and spending money in ways that make sense for teachers and students.” Pomerene will no longer buy textbooks, and Housley said a real challenge is that “the richness of the materials is now overwhelming for some.”



You need to have fidelity to the (Beyond Textbooks) program.”

TERRI ROMO
 Director of Curriculum, Sierra Vista
 School District

as was the idea that BT is a framework and not a script. As Vail’s Baker described it, “We provide the curricular structure.... We are very unapologetic about the standards and what must be taught. The ‘what’ and ‘when’ belongs to the system, but the ‘how’ belongs to the teachers.” John Carruth, Vail’s Assistant Superintendent of Special Projects, added, “Teachers are not robots. This is a partnership. Teachers contribute to the lesson bank, and this gives them ownership over what will be used.” It also, Carruth said, “magnifies the impact of their best work.”

BT comes with a warning: it only works if key stakeholders (district and school leaders as well as teachers) embrace and own it. “You need to have fidelity to the program,” shared the Sierra Vista School District Director of Curriculum, Terri Romo. “Fidelity” was a word used often,

MARKET DRIVEN, BUT NOT PROFIT SEEKING

Early on, it was clear to the Vail team that they had a marketable product in BT and there was demand for it. But this success raised some thorny issues around ownership, purpose, and profits. According to Baker, “We had some staff who became greedy. They saw this work as ‘my technological innovation’...as ‘my lesson plan.’” He continued, “We had people migrating into protective silos.” To break down those silos, Baker convened his staff and asked bluntly, “Who are we?” During the course of their conversation, he remembered, it became clear to the group that “we serve...it is what we do. We aren’t Houghton Mifflin or Pearson, who are in this for the profit. We are sticking with service.”

BT, like its parent organization the Vail School District, is market driven. It is not, however, profit seeking. This distinction is important to Baker and his team. According to Baker, “We are about educators helping educators. We are the antithesis of the Mifflins and Pearsons of the world. This is teacher driven and teacher controlled. Nothing we do is mandated.”

Too often, school reform and innovation efforts pit competing groups against each other. This is unfortunately true in more rural parts of the United States, where charter schools and school districts are seen as being incompatible, if not downright hostile to one another.

BT is market driven in that no district or charter has to purchase its services, and Baker and his team are proud of the fact that they will end relationships with districts and schools that they think aren't implementing BT with the fidelity and commitment needed for success. "We don't want them to tarnish the brand," acknowledged Baker. The \$1.5 million that BT brings annually to the Vail School District goes into supporting

the staff of five who run the program, while also providing Vail with resources to make continuous improvements to BT.

Too often, school reform and innovation efforts pit competing groups against each other. This is unfortunately true in more rural parts of the United States, where charter schools and school districts are seen as being incompatible, if not downright hostile to one another. But this narrative is being challenged by reforms and innovations that are agnostic to school/sector type and geographic region. BT is a powerful example of an organic district-led innovation that benefits teachers and students in suburban schools, rural schools, and charter schools alike. It has emerged from one district and grown to over 100 partners educating more than 100,000 students through market competition in the professional development space. Implemented with fidelity, it simply helps teachers do their jobs better, which in the end benefits children.

BT has also enabled school districts and charter schools to reduce their spending on textbooks to near zero. These savings are especially important for small school districts and one-off charter schools that may lack scale. BT breaks down barriers by bringing together a mass of educators and schools to move the needle, solve problems, and get results for students. Or, as Pomerene Superintendent Housley observed, "Other districts not using BT are spinning their wheels while we are seeing real academic gains."

• INNOVATION III: RURAL CHARTER SCHOOLS WORKING WITH LOCAL SCHOOL DISTRICTS TO SERVE ALL STUDENTS •

The best charter schools in America share common characteristics. They are smart about their use of time, recruit top education talent, utilize student-level differentiation in instruction, use data to alter the scope and sequence of classroom instruction, and sustain a culture of high expectations. Such high-fliers also benefit from stable leadership and cost efficiency, and are steady innovators constantly looking for ways to improve their product: student learning.¹⁹

Not surprisingly, top-flight school districts share many of the same qualities as best-in-class charter schools. Yet much of the debate around charter schools in America has focused on charter-district differences rather than on shared qualities of success. Too often, charter-district conversations devolve into issues of money, turf, and adult interests.

This is especially true when it comes to charter-district conversations in rural America. Robert Mahaffey, the spokesman for the Rural School and Community Trust, a Washington-based research and advocacy group, explained to *Education Week* in May 2014 that his organization rarely supports the growth of charters in rural communities. “From a resource standpoint, where we come down when it comes to charters is, first and foremost, how are they being funded?” he said. “Are you in essence draining essential resources from the traditional public school?”²⁰

But the fact is that charter schools are here to stay, and in more than 40 states and the District of Columbia an increasing number of students attend charters. Equally true, charter schools in rural communities can’t survive the charge of undermining the local economy. They need to be seen as adding economic value, not zapping it. Despite thorny money

issues, charter schools and rural school districts can work together for the benefit of their children. Charter schools make it in a rural environment when they tap into the local community's sense of self-determination and desire for local control, and the belief that the charter school is their de facto local public school. Successful rural charter schools belong to their communities and are integral to them. They are most effective when they work with the traditional schools to improve educational opportunities for all of the community's children.

Consider the Upper Carmen Charter School in Idaho. It is one of America's most remote public schools, and operates in the shadows of the Bitterroot Mountain range in eastern Idaho. Missoula, Montana is the closest big city to Carmen, and it is more than a two-hour drive along some of the nation's windiest roads. Carmen is six miles down the road from the town of Salmon. The town's population is about 3,000, and it serves as the seat of Lemhi County. The county has a total population of about 7,725 residents, down about three percent since 2010. There are approximately 1.7 people per square mile in Lemhi County, while Idaho averages 19 people per square mile.²¹

Carmen had a one-room public school of its own in the 1930s, '40s, and '50s, but that school was consolidated into the neighboring and larger Salmon school district in a wave of consolidations in the 1950s. Taking advantage of Idaho's 1998 charter school law, the Upper Carmen Charter School brought public education back to Carmen when it opened in 2005 as a K–3 school. Within five years, the school had expanded to a K–8 school serving 86 students. It is not uncommon for its students—like other kids across the state—to travel 25 or 30 miles each morning and afternoon on one of the charter school's buses to attend classes in Carmen. The public charter school has a stellar academic track record, and is regularly ranked in the top 20 percent of all public schools in Idaho.

The Upper Carmen Charter School is the creation of the wife-and-husband education team of Sue and Jim Smith. There is surely no couple better equipped to lead a charter school in rural Idaho than these two longtime educators and community leaders. Sue Smith is a master educator with degrees in elementary education and early childhood education, and she has certificates in special education and school administration. Over two decades

she has taught in private, district, and charter schools, and along the way found time to design an early-literacy curriculum. Jim Smith has worked in Idaho education for more than 40 years, beginning his career as a school counselor and special education director in Salmon. He served as Salmon's superintendent from 1981 to 1991, and worked as a deputy superintendent on finance and operational matters for the Idaho State Department of Education from 1991 to 1998. Since the summer of 2014, Jim is once again serving as Superintendent of the Salmon Public School District.

BUILDING CHARTER SCHOOL-DISTRICT BRIDGES

The Smiths, the Upper Carmen Charter School, and the Salmon School District have a complicated and enmeshed relationship. The Salmon School District serves as the authorizer for the Upper Carmen Charter School, meaning the district has oversight authority for the school. And yet, despite the fact that Jim Smith had served as the district's head for a decade, the district board and leadership resisted when the Smiths decided to open the Upper Carmen Charter School in 2005, seeing it as a threat to their numbers and their budget. According to Sue Smith, "Starting the school was a long fight and involved overcoming a number of barriers along the way."

Fast-forward a decade and the relationship between the charter school and the district is very different. Jim Smith was named Interim Superintendent of the 865-student Salmon School District in July 2014. The district school board supports the charter's plans to expand from a K–8 school to a K–12 model, with a blended-learning high school program for students from both the Upper Carmen Charter School and Salmon High School. The district is donating land for the new high school.

The blended-learning charter high school will partner closely with the district around shared services (parking, student busing, food service, extracurricular programs), in addition to offering opportunities for students to take courses at both Salmon High School and the new charter high school. The charter high school is expected to serve 45-60 students and will afford the area's high-school students an important academic option. The program will be blended (utilizing technology across the curriculum), offering dual credit, college-prep coursework, and a career tech program in partnership with Idaho's expanding P-TECH model.

Key to this spirit of collaboration has been the academic and operational success of the Upper Carmen Charter School. It has a perennial waiting list, and has become a well-respected community institution. It delivers academically in an area where academic achievement has been lagging for years. The school is seen as adding value to the overall economic and social health of the area, which is especially important in a community that has struggled economically for decades. The efforts of the Upper Carmen Charter School to work with local school districts extends beyond its work with the Salmon School District. The South Lemhi School District (enrollment of 85), located about 45 miles from Salmon, is partnering with Upper Carmen to incorporate the charter school's successful literacy curriculum across its elementary school grades.

There are other examples across the country of high-quality rural charter schools working with their local school districts to better overall education options and even breathe life back into the community. For example, in Walton, Kansas, the school superintendent was faced with having to close one of his distant elementary schools in 2007 because of declining enrollment. At the community's request, the superintendent agreed to allow the school to become a standalone charter school that would be run independently by the community and local educators. The highly regarded agriculture-based charter school has actually reversed its enrollment decline in recent years, as parents from other communities now send their children to the school because of its reputation for outstanding academic performance. The superintendent, John Martin, told an interviewer from the US Department of Education in 2011 that the charter school had actually helped to save Walton. According to Martin, "when the school goes, the community is not far behind."²²

• ANALYSIS OF CASES •

These are three very different cases. One shows how a whole community embraced charter schools as a way to help an inflexible school system adapt to changes that were about to swamp it. In another, an innovative district developed tools to support its teachers, and then scaled those tools across dozens of districts and charters in three states—and improved student learning in ways that isolated schools couldn't achieve on their own. A third illustrates how chartering a school allowed a district to preserve learning opportunities for children in a remote community where the district itself could no longer operate a school directly.

These are very different events, in very different parts of the country, yet they have some important commonalities:

- ***Efforts are unified by partnerships that break down barriers.*** Districts work with each other, districts and charters move in the same direction, business and civic leadership engage district schools and charters alike. Competitors become collaborators, and public education is redefined as a joint effort. By breaking down barriers, these efforts create larger economies of scale that result in complementarities in staffing and administrative capacities among schools that lack specific strengths of their own.

- **Shared values drive action and goals.** In the case of Georgia, the schools share a strategic belief that education is tightly entwined with economic and community development; they have to work in tandem. In Arizona, the more than 100 partners are united in their belief that getting students to higher academic standards requires a unified approach to the use of technology and fidelity to the program. In Idaho, the partners are in agreement about the need to improve early-literacy programs and high school options for students. All three efforts define success as increased student achievement. Student achievement is the Holy Grail.
- **Economic pressures stimulate innovation.** In all three cases, the changes underway in their communities were triggered in part by financial challenges. The decline of the textile industry and the economic crash of 2008 forced Dublin and its schools to rethink what they do for students. The pain of budget cuts gave birth to BT in Arizona. And the continuing economic and demographic decline of rural Idaho is strong incentive for small school districts and a charter school to work together.
- **The flexibility to do things differently is a precondition for action and ultimate success.** In Georgia, the change in the charter law encouraging charter systems allowed the Dublin School District to structure the district and its schools differently. Technological advances allowed one school district in Arizona to create an online curriculum that is now accessed by more than 10,000 teachers across thousands of square miles of desert and mountains. Both charter flexibilities and the opportunities for blended learning are key drivers for efforts in Salmon, Idaho.
- **Leaders make things happen by leading.** In all three profiles, the role of transformative leaders was critical. None of the innovations described here would have happened were it not for the exceptional leadership of Superintendent Chuck Ledbetter in Georgia, Superintendent Calvin Baker in Arizona, and the Smiths in Idaho. These leaders are not only district leaders but also highly respected community leaders. Although they run schools and school systems, their focus was on the betterment of their communities and their states. All three see the big picture and believe leadership means worrying about more than yourself and your own organizational interests. They are problem-solvers extraordinaire who find solutions wherever they are, and who motivate the people around them to take risks for kids.

• WHAT POLICY LESSONS CAN IDAHO AND OTHER RURAL STATES LEARN FROM THESE INNOVATORS? •

In studying the efforts of the innovators profiled here, others like them, and the recent work of policy experts on how to improve education for rural students, there are five policy recommendations that Idaho and other states with rural students should embrace.

1. ***Link education and community economic development.*** Education is (and always has been) profoundly shaped by demographics and economics. The health of a rural community is intimately connected to the quality and availability of jobs, and to the effectiveness of the local schools.²³ As Superintendent Ledbetter observed of education in Georgia, “We collaborate closely with the economic development authority... We are all in this together.” Ledbetter’s colleague at the local development authority added, “Education is connected to economic development, which is connected to quality of life.” Idaho’s policymakers, as well as those in other states, should encourage officials from their state departments of commerce and education to meet regularly to discuss what each is doing to improve opportunities for citizens; moreover, they may want to seriously consider housing both departments in one facility to facilitate daily interactions among officials from each. Georgia is leading the way in ensuring that education and business work together as a team. Much of the state’s recent success comes from the Office of the Governor and its commitment to doing all that he can to make Georgia the nation’s friendliest state for doing business. Business needs strong schools to prepare its workforce, and education needs business to employ its graduates.

- 2. Break down barriers to innovation.** Risks in public education must be taken and changes embraced. The whole idea behind charter schools was to provide educators with the flexibility to try different things. One of the strongest arguments for charter schools is that they are expected to be different, but too many states have erected barriers that not only make it harder for charters to operate and grow, but also make it impossible for school districts to use charters and chartering to their own advantage. Consider Idaho's charter school law, which states, "No whole school district may be converted to a charter district

The health of a rural community is intimately connected to the quality and availability of jobs, and to the effectiveness of the local schools.

or any configuration which includes all schools as public charter schools." As the education researcher Andy Smarick notes, "This amounts to an absolute prohibition against charter school conversions in the 16 of Idaho's 115 school districts that operate just one

school."²⁴ Such a prohibition prevents these Idaho districts from embracing a bold reform strategy like the one being used by Dublin, Georgia, and dozens of other districts across the Peach State. There are myriad other barriers to innovation; consider funding silos, which make it nearly impossible for school districts and even charters to target money to the specific and actual needs of students. Idaho has 33 funding silos that make running a school district or a charter school little more than an exercise in managing mandates. Again, Superintendent Ledbetter in Georgia brought clarity to this issue when he said, "Seat time should be waived and there should be a focus on mastery of content, while funds should follow students to the programs they actually participate in."

- 3. Collect and report the data necessary for all districts to compare their return on investment (ROI) to each other.** Innovators need to know whether their efforts are actually working, and the best way to make that determination is by comparing their results with those of similar districts. The education finance expert Marguerite Roza and her colleagues at the Edunomics Lab at Georgetown University have studied the data on the relationship between spending and outcomes across rural districts in various states. What they have discovered is that some districts get a much greater ROI than do similar districts serving similar students. That's not surprising, but what is troubling is that Idaho and many other states with large numbers of rural districts and charters do not track the ROI of their schools. This should change if policymakers, school leaders, and parents want to understand what works and what doesn't for their students. Innovators most of all need to know whether their efforts are actually working for both students and taxpayers.

- 4. Find the leadership where you can, and understand and respect that districts and charter schools will attract different talents.** This is true of the districts and schools profiled in this report. As Andy Smarick reported in 2014, “Rural areas struggle to recruit and retain highly effective educators.”²⁵ This is especially true in states like Idaho, where state funding is well below national averages. States should provide charter schools and rural school districts “with additional flexibility related to teacher and administrator credentialing—either through school-wide waivers from certification requirements or flexible but rigorous alternative routes to certification.”²⁶ In Idaho, the state should waive the requirement that building leaders must have at least four years of classroom experience to receive a principal’s certificate.
- 5. Policies should allow rural districts and charters to pilot innovative uses of technology.** The efforts of BT in Arizona show the power of technology to transform learning and the ways that teachers deliver instruction to students. It allows teachers to share materials online at any time and from any place, across vast geographic spaces as well as school types and sizes. This has been transformative for rural districts like Benson, Arizona, where the superintendent argues, “There is no doubt in my mind that BT helps kids get to a higher level, and it helps close achievement gaps because it helps teachers work smarter. Special education students are seeing some of the most significant gains.” It is just this sort of promise that has inspired the Upper Carmen Charter School and the Salmon School District in Idaho to work together on a blended-learning high school. Technology can break down barriers to learning, and state policies should be crafted to accelerate this transformation.

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